CARLI Alma Primo VE Migration Project
Status Report to the CARLI Board of Directors, September 18, 2020

CARLI's Ex Libris Alma Primo VE migration project has three major phases as defined by Ex Libris:

Onboarding	January 2019 - February 2019
Vanguard	March 2019 - June 2019
Full Test and Implementation	July 2019 - June 2020
Cutover/go live on Alma Primo VE	June 24, 2020
Switch to Ex Libris Support	September 1, 2020

Phase 1: Onboarding Phase (completed February 28, 2019)

During the Onboarding phase, CARLI and Ex Libris refined the scope of the project and prepared for the Vanguard phase. For a summary of the accomplishments during the Onboarding phase, see the March 8, 2019 CARLI Alma/Primo VE Migration Project Status Report to the CARLI Board of Directors.

Phase 2: Vanguard Phase (March 5, 2019 – June 27, 2019)

During the Vanguard phase, CARLI, the Vanguard libraries (NBY, NCC, SIC, UIC, and UIU), and Ex Libris did a rapid data migration of the full set of Voyager and e-resource management data for the five institutions. These Vanguard test environments reflect each library's "real" data and their own migration decisions and configuration settings. An Alma Network Zone for consortial data and resource sharing was also setup as part of the Vanguard phase. The five Vanguard library and Vanguard Network Zone test environments were replaced with the delivery of the full 91 test environments in October.

For a summary of the accomplishments during the Vanguard phase, see the June 14, 2019 CARLI Alma/Primo VE Migration Project Status Report to the CARLI Board of Directors.

Phase 3: Full Test and Implementation Phase (July 11, 2019 – June 24, 2020)

The Test Phase focuses on building a full test environment for each of the 91 I-Share libraries and a consortial Network Zone. Ex Libris delivered the test environments on October 23. The test environments include all data from each institution's Voyager database plus any e-resource data the library chose to migrate. Test environments will remain in place for the 91 institutions until Ex Libris begins to prepare them for the production loads in April or May 2020. Some components of the test environments will persist into production including libraries and locations, configuration settings, vendor records, integration profiles, and e-resource activations. Data (bibs, holdings, items, item status, patrons, etc.) will be wiped and reloaded during the production load. During the approximately 6-7 months that the test environments are in place, I-Share libraries should use these environments for staff training as well as for testing and adjusting their configuration settings, workflows, and third-party integrations (e.g., authentication, printing, self-check stations, and more).

For a summary of the accomplishments from June-August, 2019, see the CARLI Alma/Primo VE Project Status Report to CARLI Board of Directors, September 13, 2019

For a summary of the accomplishments from September-November, 2019 see the CARLI Alma/Primo VE Project Status Report to the CARLI Board of Directors, December 6, 2019

For a summary of the accomplishments from December 2019-March 2020 see the CARLI Alma/Primo VE Project Status Report to the CARLI Board of Directors, March 6, 2020

For a summary of the accomplishments from March-June 2020 see the

The following points summarize some of the work that has been completed since the last report to the Board in June:

- On the completion of the production data loads and libraries' acceptance of their data, the 89 I-Share libraries went live on Alma and Primo VE on June 24 as scheduled.
- On September 1, 2020, Ex Libris transitioned our project from implementation to "support". This means that we are no longer working with a dedicated Ex Libris implementation team and are now working through their standard customer support channels.
- In August, we transitioned from having 5 generic "sandbox" (test) environments to having copies of 5 I-Share libraries' institution zones as "premium sandboxes". The five institutions represented are UIU, UIC, SIC, RMC, and MMC. All five sandboxes were fully anonymized by Ex Libris to protect patron privacy and institutional fiscal records. RMC and MMC (Robert Morris Univ. and MacMurray College) both closed between the beginning of the project and go-live, but we are able to keep their institution zones for use as generic testing and training IZs. As this report is being prepared, CARLI has just successfully negotiated for a sixth premium sandbox at no extra charge; its contents are still to be determined.
- The I-Share libraries have been opting to begin using Alma's resource sharing service, AFN-Automated Fulfillment Network, on their own schedule. As of this report, 75 of the I-Share libraries are providing at least some AFN service.
- Circulation activity continued in Voyager until June 19 but most I-Share libraries remained closed due to COVID. A few I-Share libraries supported some local requesting (remote request by their own patrons) during the closures.
- We had planned to keep Voyager's Universal Borrowing operating until June 11, but it was turned off on March 16 due to the COVID closures including the suspension of ILDS service, and it was not restarted.
- CARLI staff have continued to work with institutions that want to use the process of synchronizing user information between campus student information systems and Alma. This process is referred to as "SIS" (student information systems). As of this report SIS setup work is complete for at least 62 I-Share institutions. Institutions set their own frequency for these updates. As our membership includes some special libraries without campus IT shops, we do not expect to ever have all I-Share libraries using the SIS process.
- CARLI staff have continued working with library staff, the EBSCO OpenAthens project team and campus IT staff on getting authentication setup for the I-Share libraries. At this writing, over 60 I-Share institutions completely setup OpenAthens for Alma and Primo VE single sign-on. Work is in process at EBSCO on "Phase 2" of the OpenAthens project which will support e-resource authentication. EBSCO has had some issues that have slowed down this setup work and it is expected to continue into early 2021.

Other related activity includes:
- In response to requests from many I-Share library directors, CARLI staff will again be doing a bulk extension of due dates to prevent patrons from being penalized for unreturned items during the time when many students have not returned to campus due to COVID changes. The CARLI Board has approved extending due dates to February 1, 2021, with libraries having the option to opt out for local circulation. All I-Share resource sharing loans will get the February 1 due date until further notice.
- CARLI has continued to hold open "office hours" calls to discuss Alma and Primo VE topics and take questions about the products and the migration process. We have moved to an every-other-week schedule as of September. These are held on Thursday afternoons at 2pm and recordings of the sessions are made available on the CARLI website. These calls have been very well attended, often still attracting over 130 participants.

Looking Ahead
- CARLI plans to decommission Voyager and SFX on October 30, 2020. No further access via web interfaces, Voyager clients, or reporting will be available after this date. We are aware that some institutions are still relying on Voyager for SIP2 access for Axis 360 and Overdrive authentication. We are working with those institutions and vendors to find an alternative solution as SIP2 is not

secure enough for sending personally identifiable information. We may keep the Voyager SIP2 port open after October 30 if an alternative solution is not yet in place.

- CARLI is purchasing a block of registrations for the new ELUNA Learns webinars being offered by the Ex Libris Users of North America. An announcement of this will be shared in the next few days.
- With our switch from implementation to Ex Libris support, CARLI will soon start having monthly meetings with some of the Ex Libris customer support staff to review current issues and how they are being addressed.

Thank You for Your Patience!

As one would expect with 89 institutions all new to Alma and Primo VE, CARLI is receiving an unprecedented number of emails to our support ticketing system. We are trying to prioritize questions that have an immediate impact on a library's operation. We expect this volume to persist for the next couple of months, so please be patient with us if your question is not urgent and remember that some questions relating to workflows and best practices might be ones to share with your colleagues on the various CARLI email lists or the ELUNA Alma and Primo email lists. As an Alma Primo VE customer we have a world-wide set of colleagues to help us.

Thank you!

Report prepared September 16, 2020
Kristine Hammerstrand, CARLI Director of User Services